Position #023391
Employee Benefit Plan Policy Advisor – Advanced
Data, Measurement, & Policy Advisor

POSITION SUMMARY:

This position serves as the Department of Employee Trust Funds (ETF) Benchmarking Manager performing advanced level work under general supervision of the Bureau of Budget, Contract Administration, & Procurement Director. The job responsibilities require significant knowledge of data and measurement with focus on the Wisconsin Retirement System and supplemental retirement programs, income continuation insurance and disability programs, deferred compensation, employee reimbursement account programs and any other benefit program established under Chapter 40 of the Wisconsin Statutes.

This position is the principal advisor and program manager for the pension administration benchmarking program. This annual analysis affects the measurement of administering over $5 billion annually in Wisconsin Retirement System annuities, disability, and separation benefits; providing education, outreach, and response services to 1,400 employers and over 600,000 participants.   The result of detailed data collection and analyses result in measures and peer comparisons for costs and services by activities and complexity of plan design which is used for agency strategic planning.

This position also works closely with executive leadership, senior managers, and key staff in developing and managing a metrics program for internal operations and reporting to governing boards; developing and implementing programs for managing vendor performance for annual contract spending exceeding $1.5 billion for health care benefit programs, actuarial services, federal tax council, IT modernization projects etc.; and using evidence-based analyses in conceptualizing and constructing budget issues and initiatives.

The priorities of work assignments for this position and work methods are advisory in effect, leaving the incumbent considerable discretion to develop approaches to analysis within statutory and policy constraints. The incumbent is responsible for finished products and decisions made. Useful precedents may not exist for many of the issues the incumbent may need to address. Work products are reviewed for responsiveness to goals and objectives and consistency with department policy.

GOALS and WORK ACTIVITIES:

35%   Goal A. Serve as the principal advisor to agency Executive Leadership and Senior Management in managing the department's CEM pension administration benchmarking program.

2%   A1.   Serve as the agency point of contact with CEM Benchmarking, Inc. and represent the agency at CEM conferences and in networking and research projects.

2%   A2.   Identify data needs and manage the assignment of data collection for the extensive, 188 question, annual questionnaire regarding pension administration costs, plan membership, transactions, communication, member satisfaction, and plan design to the relevant ETF program areas.

1% A3. Conduct pre-planning meetings with survey respondents and reviews. Plan and schedule for timely and accurate completion of the survey with validated/reliable data and information.

2% A4. Conceptualize, develop, and implement reporting programs and protocols to meet the needs of efficient and effective information management for CEM purposes.

1% A5. Conduct preliminary analysis of survey results and coordinate a final agency level review prior to submission.

3% A6. Evaluate cost and position resource allocation and attribution methodologies and recommend improvements. Identify and implement improvements.

1% A7. Research and respond to initial feedback and findings from CEM.

5% A8. Interpret and present the findings of the annual CEM published final report (in all areas: (customized peer group characteristics, costs by activity, staff productivity, transaction workload volumes, service levels, plan complexity, IT and major projects) to agency management. Work with CEM and agency leadership to provide technical assistance and support related to pension administration benchmarking to the ETF governing boards.

10% A9. Conduct multi-year trend analysis in CEM findings for Wisconsin Retirement System costs, service levels, and plan complexity in relation to peer systems and correlations between/among costs, service, complexity. Identify issues that merit further analysis. Develop recommendations for studies, projects, action plans based on findings including methodology and analytical techniques.

1% A10. Conceptualize and make recommendations for changes in plan design, service models, cost measures and methodologies, and legislative program changes to address CEM findings of deficiencies relative to ETF peer systems or areas of opportunity for improvement.

2% A11. Develop understanding of the attributes of ETF's customized CEM peer group. Develop relationships and work with peer systems in conducting research and analysis projects.

3% A12. Maintain documentation on data sources used in the CEM process and collaborate with ETF IT and Program Managers to conduct data integrity analyses and data improvement initiatives.

2% A13. Develop and provide CEM Benchmarking training for ETF management and staff.

15% **Goal B. Develop, implement, analyze, and report on bureau specific metrics for reporting to governing boards and expand measurement programs to the non-pension programs**

1% B1. Maintain and improve existing metrics.

2% B2. Develop alternatives for new metrics.

2% B3. Evaluate the use of CEM data and information for existing and new metrics.

4% B4. Evaluate alternatives based on data availability and integrity.

2% B5. Develop charts, graphs, and other materials for metrics presentations to management and governing boards.

3% B6. Work with program managers and Executive Leadership to explore benchmarking alternatives for programs not currently covered by CEM (Healthcare Administration and Optional and Third Party Administered Benefits).

1% B7. Participate in the development and delivery of metrics/measurement training for ETF management and staff and governing boards.

25% **Goal C. Lead department work teams and initiatives for evaluation and improvement of vendor/contractor performance on measures of quality, cost, resource utilization, customer service, and value.**

7% C1. Work with program managers and bureau contract administrators to develop and maintain expert knowledge of the department's complete portfolio of Chapter 40 Third Party Administrator and other contractors and their contractual performance standards and guidelines.

3% C2. Develop and implement contract performance monitoring systems and tools.

5% C3. Identify desirable contract features and problems and work with program managers and the Office of Legal Services to evaluate contract issues relative to member needs and actuarial recommendations and prudent management of the public trust fund.

1% C4. Participate in contract negotiations and development of contract documents.

3% C5. Provide guidance and oversight to the bureau's contract specialist staff in supporting and assisting program areas in their overall contract administration function.

3% C4. Identify contract compliance and vendor management potential problems. Develop alternatives and recommendations for correcting/remediating and/or mitigating risks.

3% C5. Develop and maintain contract administration process documentation. Develop and deliver contract administration training for ETF management and staff.

25% **Goal D. Conduct advanced professional budget and policy analyses.**

2% D1. Lead and participate in policy development for the department's biennial budget request.

6% D2. Conduct analyses and author budget issue papers related to resource issues to address on-going/changing workload, IT modernization initiatives, business intelligence and data analytics needs, legislative changes to programs, vendor management and contract administration.

1% D3. Develop cost-to-continue decision items, standard budget adjustments, and decision item narratives.

2% D4. Develop and implement the agency annual operating budget (currently $50 million) at individual organizational unit levels.

1% D5. Assist individual organizational units in developing projections and spending plans.

1% D6. Oversee the agency administrative appropriations and budget allotments.

1% D7. Serve as the agency point of contact with the assigned analyst in the state budget office.

1% D8. Prepare and submit agency requests for increased spending authority, position requests, supplements.

2% D9. Monitor, report, and conduct analyses on agency operational spending including metrics and management and board presentations.

3% D10. Develop operational resource forecasts and projections, develop spending plans, and conduct return on investment analyses for the agency's Transformation Integration Modernization program and related initiatives such as the Benefits Administration System to replace numerous legacy business applications.

1% D11. Work closely with bureau fiscal and accounting staff to ensure the accurate calculations, billings, collection and recording of administrative costs owed to the agency from TPAs and the general maintenance and analysis of overall agency operational financial records and data.

1% D12. Consult with the Division of Trust Finance in the allocation of agency administrative costs to the several benefit plans administered by the department [s.40.04(2)(c) Wis., Stats.].

1% D13. Provide analysis and guidance and oversight in fiscal year-end processes for certification of the agency's administrative appropriations.

2% D14. Act on behalf of the Budget & Policy Manager in his/her absence.

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KNOWLEDGE, SKILLS, and ABILITIES

1. Knowledge of Wisconsin Retirement System programs

2. Knowledge and demonstrated abilities in data analytics, metrics, and benchmarking

3. Understanding of contract administration in the public sector

4. Critical thinking, analytical, and problem solving skills

5. Ability to interpret large amounts of complex information and exercise sound judgement

6. Excellent organizational skills

7. Excellent written and oral communication skills

8. Ability to develop and maintain strong positive working relationships with peers, co-workers, supervisors, administrators and external contacts including the public

9. Advanced computer skills (complicated spreadsheets, STAR PeopleSoft)

10. Ability to prepare and deliver presentations and training materials

11. Knowledge of the state budget process

12. Ability to independently prioritize multiple assignments

13. Ability to establish and meet deadlines

14. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures